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# **Guatemala**

## **Exporter Guide**

### **Annual**

### **2001**

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#### **Report Highlights:**

**The food retail sector has been growing at about 14% a year and the HRI sector at about 12% a year. The fledgling food processing sector has been growing at about 10% a year. These three sectors offer profitable opportunities for U.S. products, which are viewed by consumers as higher in quality and are preferred to other imports. Name recognition is high for U.S. products. It is very important when attempting to enter the Guatemalan market to select a local distributor in order to maximize sales.**

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## **I. MARKET OVERVIEW**

### **A. ECONOMIC SITUATION**

During the decade of the nineties, Guatemala's economy grew at an average of 4% a year. However, since October of 1998, the economy has not been able to maintain such a brisk growth. The slow down that took place in the fall of 1998 has carried over into the last three years and growth has averaged less than 3.5% during those years. Furthermore, the economy in 2001 is expected to grow by less than 2.5%. Many factors have contributed to the slow down of the economy, among these are the following:

- Low international prices on sugar and coffee. Coffee amounts to 25% of total exports and sugar 11.2%.
- High interest rates, caused by lack of liquidity and huge deficit spending by the GOG.
- Uncertainty created by the GOG constantly changing the rules affecting business, creating a negative environment for investment. Many firms are taking a wait and see attitude before they invest in any form of production.

Despite the slower economy, demand for U.S. products has continued to grow, and opportunities exist in many sectors. However, it is important to understand the income distribution of the country, in order to properly target markets.

Income distribution is concentrated in the upper class, with 63% of income in the hands of the top 20% of the population. The polarity in income distribution determines a particular pattern of consumption, where the majority of the population consumes merely for subsistence. Therefore, luxury goods can only be targeted to a significant small portion of society. However, U.S. food products are very competitively priced and are sought out by both high income and middle income consumers. Many U.S. food products are cheaper than domestically produced products, such as grains, poultry, dairy and pork.

### **B. MARKET SIZE**

Guatemala in 2000:

- Total food expenditures more than \$3 billion
- Total consumer-oriented and edible fisheries' market estimated at \$1 billion
- Total consumer-oriented and edible fisheries' imports were \$371 million. U.S. represents 23% of this market with exports of \$85 million.
- 32% of food purchases were made in supermarkets, up from 26% in 1999.

Guatemala's economy is the largest in Central America, with a GDP of about \$19 billion. It is also one of the most important U.S. trading partners in the Caribbean Basin region. U.S. exports to Guatemala in 2000 were \$1.6 billion, which includes U.S. food exports of \$ 215 million. Total U.S. agricultural exports to Guatemala in 2000 were \$217 million. U.S. products enjoy high name recognition in the country and U.S. firms have a good reputation. As a result, almost one half of all Guatemala's imports come from the United States.

### C. DEMOGRAPHICS

Population growth has averaged 2.7% during each of the last four years. The breakdown of the population follows the pattern of an underdeveloped country. More than 50% of the population is less than 24 years of age, and 45% of the population is less than 14 years of age.

Internal migration toward Guatemala City has been constant in the last decade. The population of Guatemala City with its surrounding seven cities totals 2,082,376 inhabitants and represents 19.3% of the total population. The difference in population density between Guatemala City and the rest of the country is highly significant because it has determined the dynamics of economic and social growth of the nation. The department of Guatemala has a density of 1,212.9 inhabitants per square kilometer. The second most dense department, Sacatepequez, only reaches 557.6 inhabitants per square kilometer. The rest of the departments are below 350 inhabitants per square kilometer. Under this framework, it is easy to understand why most economic activity in the country revolves around the metropolitan area. Guatemala city and its surroundings offer the biggest concentrated market in the country with an accessible infrastructure. However, this development has created a wealth of opportunities outside this area, as they have been historically neglected. Presently, there is a marketing trend toward the interior of the country. Decentralizing has become the call of the day. Many firms are opening subsidiaries in the interior to try to capitalize on this movement. At present, there are about 38 internal cities with populations above 100,000 inhabitants.

### E. ADVANTAGES AND CHALLENGES FACING U.S. PRODUCTS

Advantages	Challenges
Of the 11.8 million Guatemalans 2.3 million inhabitants are in a position to afford imported goods.	The economic condition of the country limits imports, especially the constant weakening of the local currency.
Guatemalans view U.S. products as of higher quality and safer than national products.	There is a lack of brand awareness among importers, retailers and especially consumers.

The expanding retail industry, and the growing demand for new and better products by consumers, create an exceptional opportunity for new imported goods.	Some imports cost much more than nationally produced products, and purchasing power for many consumers is lacking.
Importers generally favor trading with U.S. exporters because of reliability.	Imports must go through a complicated bureaucratic process, and there are high tariffs and quotas on various items.
The growing food processing industry is looking for new and better food ingredients.	Limited infrastructure and distribution, especially on perishable products.
Effective market promotion can overcome price sensitivity, and retailers are open to this and will readily participate.	Regional competition is strong, especially from Mexico, El Salvador and Chile.

## II. DOING BUSINESS IN GUATEMALA

### A. BUSINESS CUSTOMS

Most business conducted in Guatemala is based on personal relationships. Business executives and government officials place great importance on personal contacts with suppliers. U.S. suppliers should be prepared to have a local representative or distributor and travel to Guatemala personally. U.S. business persons often are surprised at the accessibility to key decision-makers and the openness and frankness of local buyers.

Sales, service and support rank high in the minds of Guatemalan buyers. U.S. firms, more than other foreign firms, generally have a reputation for providing good service and support. U.S. firms interested in penetrating the Guatemalan market should make a commitment to offer excellent service support to their buyers, agents or distributors. This commitment should be made clear. Poor or mediocre service often results in lower sales. The Guatemalan business community is comparatively small and word travels fast about local and foreign firms that offer poor service support.

### B. CONSUMER TASTE

Guatemalan consumers are accustomed to U.S. products, and they have grown up with them. Many Guatemalans have traveled to the U.S. and have been introduced to American food products. U.S. products are viewed by consumers as higher quality and are preferred to other imports. More than 50% of all Guatemalan imports come from the U.S. Culturally speaking, Guatemalans have adopted much of the U.S. culture such as music, sports, fashion and fast food. Guatemalans have also followed the trend in the U.S. towards more convenience and demand for these type of products has grown in the last few years, and the trend is expected to continue.

### C. FOOD STANDARDS AND REGULATIONS

The Division of Registration and Control of Medicines and Foodstuffs of the Ministry of Health, hereafter referred to as Food Control is the main authority for food products legally imported or manufactured in Guatemala. The Health Code which regulates Food Control was established in 1979 by Government Decree # 45-79. Title II Chapter Two of the Health Code refers to food products. Food Control, under authority of Ministerial Decree 132-85, is responsible for upholding food product norms set by the Guatemalan Ministry of Economy's Commission of Standards (COGUANOR). This commission is governed by the Executive Advisory Committee which is made up of representatives from the Ministry of Health, Ministry of Economy, Ministry of Labor, School of Engineers and Chambers of Agriculture, Industry and Commerce.

In addition, all imported foods of animal or vegetable origin, including grains for further processing, must comply with the following requirements: present a Phytosanitary or Zoosanitary certificate, a certificate of origin, a certificate of free sale, import license and a commercial invoice. All of these requirements are controlled by the Unit of Norms and Regulations from the Ministry of Agriculture, Livestock and Food.

There are many specifications, rules, legislation and other requirements regulating food products. These requirements are quite complicated and often subject to different interpretations. However, there is a considerable lack of resources in Food Control to effectively enforce the Health Code. Currently, many products are sold with the exact same label as in the U.S. This trend is changing and more importing companies are complying with the law in anticipation of stricter enforcement by the Ministry of Health. For additional information read this office's FAIRS Report 2001 at [www.fas.usda.gov/scripts/w/attacherep/default.asp](http://www.fas.usda.gov/scripts/w/attacherep/default.asp).

**Product Registration is required** for all packaged food products in Guatemala. Food Control at the Ministry of Health is responsible for all registrations. Food Control issues a registration number after a laboratory test has been performed on the product. This registration number is valid for five years and takes six weeks to obtain. In addition to the laboratory analysis done on the product at the time of registration, the law requires inspections at the point of entry, wholesale and retail level for the wholesomeness of the product. There is no environmental legislation that affects the importation of food products. The cost of registration and analysis of a product is about \$100 U.S. Dollars.

**Labeling requirements** are set by COGUANOR'S labeling standard #34039. It sets 40 requirements with respect to the appearance of the label, what information should be on the label

and that it is written in Spanish. However, importers negotiated with COGUANOR and reached an agreement for a stick-on label to be used with the following information written in Spanish:

1. Product definition/description
2. Name of the product(*This should be the official name as noted on the U.S. Certificate of free sale*)
3. Physical characteristics, Including ingredients (This has to be a qualitative composition, which was indicated in the back of the registration form). If this information is in English, please translate literally.
4. Net weight/volume
5. List of ingredients and additives and the percentage of total for each
6. Name, address and telephone number of the Guatemalan distributor
7. Food Control registration number (D.G.S.S.-D.R.C.A. \_\_\_\_\_) --*Sanitary license; obtained at a Center of Sanitation; the original license has to be presented. Cost for each product is about Q630.*
8. An expiration date
9. If applicable "Keep Frozen"
10. If applicable "Form of Preparation"

**The import procedure** for products of animal or vegetable origin is an inspection by the "ventanilla unica" from the Unit of Norms and Regulations of the Ministry of Agriculture. The documents required are: Phytosanitary or Zoosanitary certificate, commercial invoice, import license, a certificate of origin and certificate of free sale. In order for the regulating entity to extend an import licence, they first request an original Phytosanitary or Zoosanitary certificate. Whether the imported product is transported by air, land or sea, inspectors from OIRSA (The Inspection Entity from the Ministry of Agriculture) will be on sight to reassure that the paper work is properly completed. Then, inspectors often perform an ocular inspection of the imported products in order to release them from customs. Packaged foods are regulated by the Office of Food Control at the Ministry of Health. The procedure is similar to the one at the Ministry of Agriculture with the difference that the sanitary certificates are extended by the LUCAM which is the laboratory in charge of sanitary inspection.

### **Tariff Rate Quotas**

PRODUCT	QUOTA	TARIFF	TARIFF
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	(MT)	(OUTSIDE QUOTA)	
Beef, fresh, refrigerated and frozen.	1595	0%	30%
Apples	9,100	12%	25%
Wheat Flour	78,000	4%	10%
Yellow Corn	501,820	5%	35%
Rice	43,744		
Milled	644	16.2%	32.4%
Paddy	40,500	0%	32.4%
Puffed	2,600	0%	32.4%

The TRQ for beef is suspended for 2001 and there is no quota assignment this year nor is there an import license required. Instead of the TRQ, imported beef pays a 15% tariff, and the importation is open with no limit. However, the GOG reserves the right to implement the TRQ if the need arises.

This year, the imports of two products were liberated with no quota assignments. The products were poultry and wheat. Furthermore, tariffs were reduced for these products. The poultry tariff was completely eliminated and wheat tariff was lowered to 2%.

#### **D. ENTRY STRATEGY**

About half of all firms selling into the Guatemalan market do so by means of an agent or distributor. The rest sell directly to Guatemalan buyers. Generally speaking, the more pre-sales marketing and after-sales support that the product requires, the more important it is to have a local agent or distributor. One of the most important decisions a U.S. company will make in Guatemala will be the selection of a qualified sales representative and/or distributor. A distributor with well-positioned sales outlets in the major commercial locations will greatly enhance chances of capturing a major share of the end-user market.

To sell directly to Guatemalan firms, U.S. firms will need to build a relationship with the buyers, as explained in business customs, as well as travel to Guatemala at least to twice, before expecting a sale. Also, interest rates in Guatemala are very high. Therefore, U.S. firms will need to provide some credit in order to enter market.

### **III. MARKET SECTORS**

#### **A. RETAIL MARKET**



Over the last six years the supermarket sector has been growing rapidly, more than doubling in sales, from \$126 million in 1995 to more than \$260 million in 2000. This increase is due to the increase in urbanization, growing middle of two income families and the need for convenience packaged foods. In that same short period, supermarkets' share of food sales has gone from 15% to 32% of total food sales, slowly picking away at wet market sales. In addition, retail outlets increased from 67 units in 1995 to 126 units in 2000. Overall, consumer-oriented goods account for 32% of all U.S. agricultural exports to Guatemala. For additional information regarding this sector read this office's Retail Report at [www.fas.usda.gov/scriptsw/attacherep/default.asp](http://www.fas.usda.gov/scriptsw/attacherep/default.asp).

## **B. HOTEL, RESTAURANT AND INSTITUTIONAL**

The food market in the HRI industry for 2000 was estimated to have been more than \$500 million with a 7% growth over the previous year. Prior to last year, this sector had been growing at an average of 14% a year, but the economic downturn slowed down the growth. However, there is still growth in this sector, and opportunities for U.S. food companies that provide products to this sector. Presently, a third of the restaurants and hotels utilize imported products and 79% of this food is from the U.S. The higher quality of U.S. beef enables it to compete in this market, and some restaurants take advantage of the name recognition, and use it as part of their advertising. In 2000, U.S. exports of edible fisheries to Guatemala were \$1.7 million, of which \$1.3 million were consumed in hotels and restaurants. However, total imports of edible fisheries was \$7 million in that same year. There are Hotels seeking products such as oysters and calamari, and they can't find local companies to supply them.

The hotel industry has grown tremendously in Guatemala in the last five years. In 1995 there were only 12,033 rooms available and now there are 15,473. The most recent addition was the Inter-Continental which opened in October of 2000 in Guatemala City. It is a 16-story hotel with 240 rooms.

The overall growth of tourism in Guatemala has increased dramatically in the last five years. In part because the government has spent tremendous amounts of money in international advertising and thanks to the signing of the peace treaty in 1996, which ended a 36-year-old civil war. In 1995, income from tourism totaled \$238.8 million and in 2000 it totaled \$368.3 million, an increase of 54%. Visitors to Guatemala increased from 563,478 visitors in 1995 to 826,240 visitors in 2000.

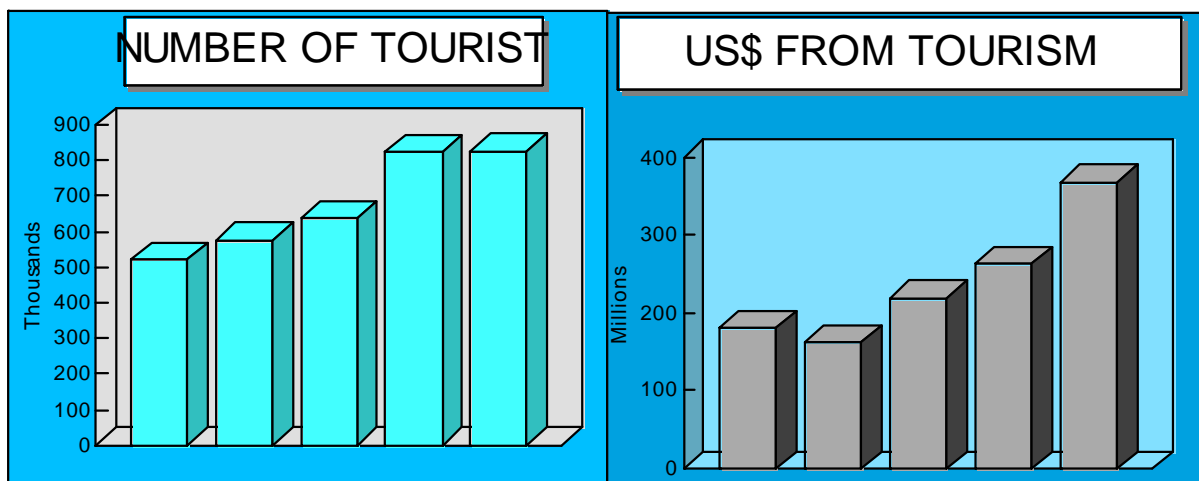
Institutional sales in Guatemala are probably the most difficult of all sales. The procurement process is very difficult and very bureaucratic. (Development of good contacts on the inside is still the best way to make the sale.) Also, the repayment delay is usually from 90 to 120 days and sometimes even longer. This market should be approached with the use of a distributor that is already supplying institutions and is very familiar with the process.

### C. FOOD PROCESSING

Compared to the developed markets, the food processing sector is very small and young. Yet, the food processing sector has grown at an average rate of 12% a year over the last five years. In 1995 total market size of this sector was \$222.3 million and by 2000 it totaled \$392.7 million. This sector offers opportunity for U.S. exporters to supply these plants with quality raw materials. The companies that can supply raw materials and ingredients to the following sectors are in the best position to supply this market:

- Meat Processing
- Fruits and Vegetables
- Dairy
- Bakery
- Edible Oils
- Snack Foods
- Beverages

U.S. products such as beef, pork, wheat, soybeans, vegetables as well as other food items can easily be introduced to improve the quality of the goods being processed in the above-mentioned



sectors. Many of these plants already use U.S. raw materials, however, there is still plenty of opportunity. This market sector is expected to continue to grow at about 12% a year.

**IV. BEST PROSPECTS****BEST PROSPECTS TABLE**

<b>Product/Sector</b>	<b>Total Imports *</b>	<b>Imports from U.S.*</b>	<b>U.S. Market Share</b>	<b>Projected Growth</b>
Beef	\$21.70	\$6.10	28%	8%
Cheese	\$8.80	\$2.00	23%	10%
Forest Products	\$10.00	\$3.40	34%	9%
Processed Fruits & Veg.	\$25.40	\$14.50	57%	12%
Poultry	\$21.50	\$21.00	98%	20%
Wine	\$1.90	\$0.36	19%	6%
Snack Foods	\$27.40	\$6.10	22%	6%
Dairy	\$58.80	\$7.10	12%	7%
Fruit	\$14.80	\$9.30	63%	10%
Rice	\$7.70	\$7.20	94%	4%

\* In Millions of U.S. Dollars

**V. POST INFORMATION**

If you have any question or comments regarding this report or need assistance exporting to Guatemala, please contact the U.S. Agricultural Affairs Office at the following address:

Office of Agricultural Affairs  
Avenida Reforma 7-01, Zona 10  
Guatemala, Ciudad 01010  
Tel: (502) 332-4030  
Fax: (502) 331-8293  
email: [AgGuatemala@fas.usda.gov](mailto:AgGuatemala@fas.usda.gov)

For more information on exporting U.S. agricultural products to other countries, please visit the Foreign Agricultural Service home page: <http://www.fas.usda.gov>

**VI. LIST OF MAJOR REGULATORY AGENCIES**

Name: M.V. Fernando Arceyuz  
Title: Jefe  
Institution: Departamento de Regulaciones y Control de Alimentos  
Address: 11 Avenida "A" 11-57, Zona 7. Finca La Verbena, Guatemala  
Telefax: (502) 471-9958, 440-9500

Name: Licda. Celestina de Palma

Title: Director  
Institution: Dirección General de Regulación, Vigilancia y Control de la Salud  
(Health Services General Office, Ministry of Public Health)  
Address: 6 Avenida 3-45, Zona 11, 3 Nivel, Escuela de Enfermería, Guatemala  
Tel/Fax: (502) 475-2121

Name: Licda. Ebenora de Bonatte  
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Institution: Laboratorio Unificado de Control de Alimentos y Medicament (LUCAM)  
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Name: Ing. Jorge Mario Santos  
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Name: Ing. Marcio A. Ibarra M..  
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Name: Lic. Carlos Illescas  
Title: Director  
Institution: Registro de la Propiedad Industrial  
Address: 5 Calle 4-33, Zona 1, Edificio Plaza Rabi, Oficina 701  
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Telephone: (502) 230-1822 / 230-1693 to 5  
Fax: (502) 230-1694

Name: Ing. Hector Herrera  
Title: Jefe de Normas

Institution: Comision Guatemalteca de Normas (COGUANOR)  
 Address: 8 Avenida 10-43, Zona 1, Guatemala City, Guatemala  
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Name: Licda. Lucia Dubón  
 Title: Relaciones Públicas  
 Institution: Ministry of Public Health  
 Address: 6 Avenida 3-45, Zona 11, 3 Nivel, Escuela de Enfermería  
 Guatemala, Guatemala 01011  
 Telephone: (502) 475-2121 ext. 131  
 Fax: (502) 475-3787

Name: Licda. Patricia Ramirez  
 Title: Registrador  
 Institution: Valuables and Merchandise Registry (From the Ministry of Economy)  
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 Telephone: (502) 221-4988, Ext. 236  
 Fax: (502) 232-9388

Name: Licda. Maura de Muralles  
 Institution: Ventanilla Unica para Inversiones  
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 Telephone: (502) 253-9640  
 Fax: (502) 251-5055

## VII. APPENDIX

### A. KEY TRADE

PRODUCT IMPORTS	FROM THE U.S.	TOTAL	U.S. SHARE
Total Agricultural	\$217.0 million	\$623.6 million	34.8%
Consumer-Oriented	\$85.2 million	\$371.3 million	22.9%
Edible Fishery	\$1.5 million	\$7.0 million	21.4%

Source: U.N. Trade Data

### B. DEMOGRAPHICS

POPULATION	TOTAL 2000 (Estimated)	GROWTH RATE
TOTAL POPULATION	12 Million	2.7%
URBAN POPULATION	4.7 Million	3.2%
SIZE OF THE MIDDLE CLASS	3.8 Million	1.6%

NUMBER OF MAJOR METROPOLITAN AREAS	38 <sup>/1</sup>
PER CAPITA GROSS DOMESTIC PRODUCT	\$1639.8
PER CAPITA FOOD EXPENDITURES	\$265
UNEMPLOYMENT RATE	5.9% <sup>/2</sup>
PERCENT OF FEMALE POPULATION EMPLOYED	27.4%
EXCHANGE RATE (SEP. 2001)	\$1.00=Q7.87

Source: The Ministry of Economy

1/ These are cities with more than 100,000 inhabitants.

2/ This is the official Rate, but underemployment is estimated to be 46%.

## C. CONSUMER FOOD & EDIBLE FISHERY PRODUCT IMPORTS

Guatemala Imports	Imports from the world Millions of U.S. Dollars 1998 1999 2000	Imports from the U.S. Millions of U.S. Dollars 1998 1999 2000	U.S. Market Share Percent 1998 1999 2000
<b>CONSUMER-ORIENTED AGRICULTURAL TOTAL</b>	<b>344 338 371</b>	<b>101 105 85</b>	<b>29% 31% 23%</b>
Snack Foods (Excl. Nuts)	31 27 33	3 4 5	11% 15% 15%
Breakfast Cereals & Pancake Mix	14 15 16	2 2 2	14% 13% 13%
Red Meats, Fresh/Chilled/Frozen	12 12 15	5 7 6	42% 58% 47%
Red Meats, Prepared/Preserved	10 10 12	5 6 7	47% 60% 58%
Poultry Meat	13 12 12	15 12 11	95% 100% 92 %
Dairy Products (Excl. Cheese)	56 52 58	4 3 4	7% 6% 7%
Cheese	7 7 7	2 2 2	31% 29% 29%
Eggs & Products	2 2 2	1 1 1	32% 50% 50%
Fresh Fruit	14 14 19	9 9 11	69% 64% 58%
Fresh Vegetables	2 3 2	1 1 1	33% 33% 50%
Processed Fruit & Vegetables	23 26 24	7 8 8	30% 31% 33%
Fruit & Vegetable Juices	15 18 17	4 5 4	25% 28% 24%
Tree Nuts	1 1 1	1 1 1	93% 100% 100%
Wine & Beer	3 4 3	1 1 1	17% 25% 33%
Nursery Products & Cut Flowers	2 3 3	1 1 1	10% 33% 33%
Pet Foods (Dog & Cat Food)	3 3 4	3 3 4	98% 100% 100%
Other Consumer-Oriented Products	135 131 141	41 41 19	30% 31% 14%
<b>FISH &amp; SEAFOOD PRODUCTS</b>	<b>6 6 7</b>	<b>1 1 2</b>	<b>17% 17% 21%</b>
Salmon	1 0 0	0 0 0	33% 50% 73%
Surimi	1 0 0	0 0 0	83% 100% 98 %
Crustaceans	1 1 2	0 0 1	46% 47% 46%

Groundfish & Flatfish	1	1	0	0	0	0	17%	29%	26%
Molluscs	1	0	0	0	0	0	53%	75%	89%
Other Fishery Products	5	4	5	1	1	1	10%	8 %	7%
<b>AG. PRODUCTS TOTAL</b>	<b>600</b>	<b>619</b>	<b>615</b>	<b>262</b>	<b>275</b>	<b>215</b>	<b>44%</b>	<b>44%</b>	<b>35%</b>
<b>AG. FISH &amp; FOREST TOTAL</b>	<b>616</b>	<b>635</b>	<b>623</b>	<b>266</b>	<b>279</b>	<b>217</b>	<b>43%</b>	<b>44%</b>	<b>35%</b>

## D. TOP 15 SUPPLIERS OF CONSUMER FOODS & EDIBLE FISHERY

### Consumer-Oriented Total (Thousands \$US)

	1998	1999	2000
United States	100,592	104,882	85,213
El Salvador	74,763	65,721	80,344
Mexico	28,472	42,182	68,462
Costa Rica	45,541	42,573	51,358
Honduras	15,289	17,383	19,124
Chile	9,633	12,772	10,841
New Zealand	14,008	10,742	10,425
Nicaragua	7,049	3,871	7,707
Canada	5,409	5,885	5,700
Panama	3,875	4,361	5,014
Netherlands	5,182	3,052	2,619
Spain	3,346	3,227	2,619
Argentina	3,074	1,856	1,823
United Kingdom	10,938	2,215	1,193
Australia	3,074	1,856	17
World	344,216	338,219	371,295

### Edible Fishery (Thousands \$US)

	1997	1998	1999
Costa Rica	3,853	2,346	3,284
United States	1,072	1,209	1,522
El Salvador	116	320	676
Thailand	206	420	531
Colombia	57	60	350
Nicaragua	152	349	197
Chile	286	174	155
Spain	410	341	116
Mexico	48	42	78
Ecuador	51	63	28
Panama	35	66	19
Honduras	9	18	11
Taiwan	0	5	4
Netherlands	0	8	3
Hong Kong	27	4	1
World	6,492	5,525	6,988